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PSI announces Successful Fundraising Handbook
Are you planning a building project—a new church, an addition, a school building, a Community Service building, for example? Do you wonder how you should go about getting the funds? Does it seem like your campaign for funds goes on forever? Are your members or constituents tired of talking about money? If you have these questions and probably many others, please read on.

Seventh-day Adventist leaders in churches, church schools, and church ministries such as Community Services, understand that “we’ve always done it that way” is an adage that no longer works. These leaders are looking for more responsible and credible ways to raise money. Beginning with the question, “Where do I start?” and moving through the process of raising money responsibly, this handbook is designed to help pastors and lay leaders avoid pitfalls and raise money responsibly, in ways that work today.

Much has changed from the simpler times when giving to churches and their programs was taken for granted, when members could be counted on to give because “God said so,” and when there was less competition both for the spiritual as well as material attention of our constituents.

Local church leaders have approached Philanthropic Service for Institutions (PSI)—a department of the North American Division of Seventh-day Adventists (NAD)—for assistance in understanding how to carry out fund-raising in the best ways. We are responding to the growing desire by leaders and committees to do it right and aim for success rather than rely on outdated and ineffective strategies. As these visionary Adventist leaders see the need to raise funds besides tithes and regular offerings, they learn the best principles and practices and adapt them to their particular projects and situations. Therefore, this handbook is designed to help these astute individuals in their journey toward accomplishing their goals, whether project, campaign, or ongoing financial support goals. There are no shortcuts to raising funds, no “ten easy steps,” which means this is a working handbook, to be used in conjunction with the assistance of PSI. This handbook is just one of many services PSI provides (see following chapter which introduces PSI) and is not designed as a stand-alone item. It is best used with the help of
a PSI staff member or designated advisor who can help a church or organization prepare for responsible fund-raising.

Please contact PSI for additional information. Also, we invite you to visit the PSI Web site, [www.philanthropicservice.com](http://www.philanthropicservice.com). PSI services are without charge to NAD organizations and churches. Request from independent Adventist organizations are also handled as much as possible. The NAD is unique in providing a consulting service to its member institutions and leaders, and supporting the adoption of what works best for today’s church organizations.

This handbook won’t be mass distributed but will be provided at the request of organizations that approach PSI for assistance in carrying out successful fund-raising for today’s organizations in today’s environment and circumstances. (read more)

In this handbook, you will find a variety of resources. You will find an overview of what is the foundation of good fund-raising—stewardship, biblical, and Ellen White counsel, legal considerations and, above all, a chapter on “before you start.” You will also find an introduction to the best of fund-raising, the principles, and the practices. Finally, you will find articles on specific strategies and campaigns, particularly the capital campaign, which is of most interest to pastors and churches and church-sponsored ministries.

We congratulate you for wanting to perform at the optimum level in serving God and your constituents and applaud your desire to learn what works best. Thank you for contacting and working with PSI and we look forward to a most favorable relationship with you.

—Dr. Lilya Wagner, Director, Philanthropic Service for Institutions

—Dr. Nikolaus Satelmajer, Handbook Editor and Author

**This is a working handbook, to be used in conjunction with the assistance of PSI. This handbook is just one of many services PSI provides and is not designed as a stand-alone item. It is best used with the help of a PSI staff member or designated advisor who can help a church or organization prepare for responsible fundraising.**

**This handbook won’t be mass distributed but will be provided at the request of organizations that approach PSI for assistance in carrying out successful fund-raising.**
fundraising for today’s organizations in today’s environment and circumstances.

The handbook may be purchased from AdventSource, 5040 Prescott Avenue, Lincoln, NE 68506; 1 (800) 328-0525; www.adventsource.org.

Read more about the handbook in this article from Adventist News Network. Click here

To download this article, click here.

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**Union College uses the iPad to connect with prospective donors**

by Jennifer Schmitt

If any of us needs a reminder that the most exciting thing about new technology is that its real power lies in creating connections, then Todd Mekelburg, Director of Leadership Giving at Union College (UC), has a story to tell.

In June 2011, Union College launched a capital campaign called "Our Promising Future" to build a new science and mathematics complex to replace Jorgensen Hall, home to the Division of Science and Mathematics for 67 years.

In his presentations to donor prospects, Mekelburg typically opened a folder filled with the pieces of information he would need to reference during the conversation. A majors chart, with a list of all the science and mathematics majors. Building plans. Architectural renderings of outside and interior spaces. A gift range chart, showing how UC planned to meet its goal, with the types and amounts of gifts.

Ten pieces in all. At the end of a presentation, papers covered the table and Mekelburg felt scattered and unorganized as he tried to put all of the pieces back together in order. He felt sure there had to be a better way to share information with prospects, one that was less cluttered.

The light bulb moment came to him at the 2010 General Conference session, where Union College had one of the premier booths. In their booth, they made use of three iPads
loaded with videos and information about the college. He noticed that when people stopped by, they were sitting down with an iPad and becoming engrossed in the material. They were spending time and taking it in at their own comfort and speed.

After the conference, LuAnn Davis, Vice President of Advancement at UC, requested an iPad for her department. Mekelburg sat down with Public Relations Director Ryan Teller to see if there was a way to integrate all of the necessary documents into an intuitive, elegant presentation on the iPad.

There was, and they did. The result was a slideshow with all the pieces that once filled a whole table. Now Mekelburg could go into a donor’s home or office, without a bulky laptop and without having to spread out a stack of papers or to reassemble them when he finished. It transformed those meetings for him and created a more personal experience. He found he could show the presentation anywhere, and it was a more pleasant, comfortable way to present information.

Now, when he begins a presentation, he hands the iPad to the prospect. Though he guides the presentation, it becomes a truly interactive experience for donors, since they control the speed of the information.

Using the iPad in such a way also shows that Union College is technologically savvy. “It creates curiosity,” Mekelburg said. “They’re fascinated by what they’re seeing and it’s also simple to operate, even for those who haven’t used one before. I tell them, ‘Everything you’re going to see is also here on paper,’” and he leaves behind a folder with all of the information that was in the presentation. Donors can then log onto the website to track the progress of the project. The department follows up with print mailings, as well.

One moment stands out for him as an example of what a powerful tool the iPad has become for this campaign.

A donor contacted Mekelburg, wanting to set up a charitable gift annuity. When it was time to close on the gift, Mekelburg arranged to meet with the man in person. What the donor didn’t know was that in the intervening time, the public relations department at UC had developed a 30 second commercial, and that one of the featured students was the donor’s granddaughter.

Mekelburg sat down with him and said, “I want you to see something.” He handed over the
iPad. “And when his granddaughter flashed onto the screen it was such a powerful moment. It affirmed my belief in using technology like the iPad in to create a connection. In just 30 seconds, it created such an emotional connection.”

That is why Mekelburg is sure that - even though there are no specific plans to use the iPad in other campaigns - the department will continue to use the iPad to connect with prospective donors. Already, everyone in his department who visits with donors is using this technology to talk about the campaign, which runs through December 2012.

For more information, contact Todd Mekelburg at tomekelb@ucollege.edu or by phone at 402.486.2600 x2200.

To download this article, click here.

Donors' Million-Dollar Resource

For philanthropists planning gifts of $1 million or more, the questions of where, when, and why to give take on great significance. A resource is now available to help these donors and their advisors make those decisions: the Million Dollar List, at milliondollarlist.org.

Researched by the Center on Philanthropy at Indiana University, this free, searchable database offers donors and their financial advisors access to data and insights about gifts of $1 million and up. The list tracks publicly reported charitable gifts of $1 million or more by individuals, corporations, foundations, and other nonprofits since 2000 and will be updated periodically. Read more in this article from Philanthropy Matters.

Will your annual report be the best it can be?

Some helpful resources from IdeaEncore to help you shape and format your annual report:

Talking to Ourselves? A Critical Look at Annual Reports in Private Foundation Communications, from the Communications Network. This study is aimed primarily toward private foundations, but any nonprofit can benefit from the advice and the self-assessment
Evaluation: Measuring What Matters in Nonprofits breaks down some vital performance metrics. The report includes visual resources, such as charts, graphs and maps, to make your annual report more visually interesting and compelling to your donors.

A Consumers Guide to Low-Cost Data Visualization Tools, from IdealWare, will help you make use of software and tools that you already have to create interesting and compelling visuals for your annual report.

Resources


Colleges and universities continue to face significant fundraising challenges in today's economy, meaning it is more important than ever for institutions to focus on successful, innovative fundraising strategies. WealthEngine's report, Best Practices for Prospect Research in Higher Education Fundraising-2nd Edition, can help you improve the productivity, efficiency and value of your fundraising operation, while reaping rewards for your institution. Read more

The Journal of Gift Planning now available online

The Partnership for Philanthropic Planning's (PPP) online e-community now includes access to the online Journal of Gift Planning. Click here to go to the e-community.

The nation's most experienced gift planners share their knowledge and experience in The Journal of Gift Planning. New Journal articles and the archive of articles from past issues are both available online in the The Journal of Gift Planning group in PPPs e-community. PPP members may join the Journal group to view or download articles and interact with authors and the Journal editor through the Journal blog and forums.

Journal articles cover a wide variety of topics related to charitable gift and estate planning, including: Technicalities related to the design of gifts or the use of particular assets; marketing tools, techniques and trends; how-to guides for tasks that range from the most basic (e.g., conducting a bequest program) to the most controversial (e.g., evaluating the annual performance of planned gift fundraisers). Click here, then follow directions under
Getting Started in the left column.

Gifts-in-Kind

Organizations like Good360 are meeting the needs of nonprofits by acting as brokers and warehousers for products that nonprofits need. They also help business donate their goods, efficiently, to qualified nonprofits who are doing good in the communities they serve.

The collection and distribution of these products helps nonprofits meet their mission, helps communities and local businesses give back to the communities where they work and live. It also increases the impact of cash gifts that go toward shipping costs to transport goods to qualified charities. The result is a win-win outcome for products that may have been overstocks and unsold inventory, and can instead go to the organizations who need those products.

AFP Educational opportunities

2012 WEBINARS ARE NOW OPEN FOR REGISTRATION

Looking for a great lunchtime education session? How about one that offers 1.5 CFRE Continuing Education credits? Experts in the fundraising field talk on a wide variety of topics. Each webinar is worth 1.5 CFRE Continuing Education Credit. For more information, click here to see the upcoming 2012 Webinar schedule.

People to People Fundraising: Social Networking and Web 2.0 for Charities

People to People Fundraising is a movement established to provide practical advice to nonprofit staff members looking for non-technical information on using technology, the Internet and databases to raise money and build communities. People to People Fundraising is rooted in everyday management issues and language to help nonprofit staff members bolster their charity’s presence, awareness, and success today, and for their
People to people fundraising has become the breakthrough tool to help nonprofit organizations drive philanthropy. Learn how to tap into the considerable opportunities of social networking on the web with the practical, hands-on techniques and case studies found in People to People Fundraising. (http://www.p2pfundraising.org)

News and resources for our Canadian members

Imagine Canada addresses public policy engagement issue
You may have been following the story in the media about the role of charities in the public policy process. Imagine Canada is concerned about this issue, too. Follow this link to read a letter from Imagine Canada about public policy engagement. The letter is in response to the open letter by Minister Oliver addressing the Northern Gateway pipeline review. Imagine Canada believes that the voice of charities is critical and that debate and discussion will always make for better decision making. Click here to read a statement from from Marcel Lauzière, President & CEO of Imagine Canada.

Canadian Council of Christian Charities
Are you finding it difficult and time consuming keeping up with all the legal and administrative requirements of running a charity? Canadian Council of Christian Charities can help! Our friends call us "The 4 C's"!

CCCC is the largest association of charities in Canada with over 3,000 member Christian charities. We provide practical, expert resources for your support and leadership functions. Our staff of accountants, lawyers and ministry credential holders answer over 18,000 questions each year on areas like:

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human resources, payroll & policies
charity law
church board governance
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Give us a call at 519 669 5137 or visit us on the web at www.cccc.org
Advancing Ministry Together!

Planned Giving for Canadians
Many U.S. charities – particularly colleges and universities – receive planned gifts from their Canadian supporters. Planned Giving for Canadians, now in its third printing, is the comprehensive resource on the subject for the charitable sector and for those working in partnership with charities, including lawyers, accountants, bankers, financial managers, estate planners, and insurance professionals. It is an essential resource for development officers who want to be able to offer their Canadian donors a full range of effective giving options. Authors: Frank Minton and Lorna Somers.

For more information go to: http://www.cagp-acpdp.org

Resources for our Hispanic members
PSI encourages our Hispanic members to visit our website at this link to explore the resources we offer. By exploring our website you will find information to develop systematic, ethical fundraising. Under the direction of Dr. Lilya Wagner, CFRE, PSI continues to pave way for the Hispanic leadership in developing a fundraising program through teaching fundamental principles and practices. To learn more, you can contact us at 301.680.6133 or by email: lorena.hernandez@nad.adventist.org.

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First Adventist fundraising handbook to guide church building projects

Jan. 31, 2012 Silver Spring, Maryland, United States

Elizabeth Lechleitner/ANN

A local congregation decides to build a church fellowship hall, but doesn’t secure adequate funding beforehand, assuming “the money will come once we get going.” It’s a familiar scenario, and one Seventh-day Adventist philanthropy experts are hoping a new fundraising guide will help local church leaders avoid.

“If you believe the Lord will bless later for the money to come, you can also believe the Lord will bless right now and bring it,” said Nikolaus Satelmajer, who wrote and edited “Successful Fundraising: A Guide for Local Churches” with Lilya Wagner, director of the church’s Philanthropic Service for Institutions (PSI).

As its name implies, the department has historically served the fundraising needs of the church’s educational and healthcare institutions. But today, PSI is fielding more and more requests from local congregations. As multi-million dollar building and capital projects become routine, fundraising is an increasingly complex endeavor, Satelmajer said.

“While there are countless how-to volumes, I wanted something customized for Adventist campaigns and projects,” Wagner said. “It was challenging but also satisfying to take the best experiences and practices in my field and adapt them to the needs of [Adventist] leaders.”

“Successful Fundraising: A Guide for Local Churches” (AdventSource) is the first such handbook written and edited by Adventist philanthropy leaders.

The handbook will serve as a springboard to any fundraising project, with advice and formulas on advance planning, structuring a capital campaign, stewardship principles and avoiding debt fatigue, Satelmajer said.

While the handbook specifically targets a North
American audience, its principles will apply worldwide, he said. One chapter explores Ellen G. White’s approach to fundraising. The Adventist Church co-founder was a key figure in fundraising for many of the early church’s healthcare and educational institutions. A study of her methods indicates that she believed in asking for donations, especially from those she knew well and from potential donors outside of church membership.

“You have to get to know the person, and you have to present them with a case -- Here’s what we’re doing and why we’re doing it. It’s not enough to say, ‘We’re building a new church, will you give us money?’” he said.

Another key principle is getting the entire church behind a project before moving forward, Satelmajer said. With church-wide support, a building project can unify a congregation around a single goal, but when the majority of members are reluctant, a project “can really damage the relationships in the church,” he said.

“We spend quite a bit of time developing this idea -- How do you make it a church project, and not just a project of three or four enthusiastic people who commit $100,000 and say the other million will surely come,” Satelmajer said.

“Successful Fundraising: A Guide for Local Churches” is available through AdventSource as a first resources for local pastors and lay leaders. PSI is encouraging those who purchase the handbook to contact the department for further support, including advice, referrals to local resources and -- in some cases -- a site visit.

“PSI can answer some questions and provide some advice over the phone and will do their best to send someone qualified to work with the congregation,” Wagner said.
Donors’ Million-Dollar Resource

The Million Dollar List helps philanthropists and their advisors leverage large gifts.

For philanthropists planning gifts of $1 million or more, the questions of where, when, and why to give take on great significance. Now these donors and their advisors can turn to a new resource for help: the Million Dollar List, milliondollarlist.org.

Researched by the Center on Philanthropy at Indiana University, this free, searchable database offers donors and their financial advisors access to data and insights about gifts of $1 million and up. The list tracks publicly reported charitable gifts of $1 million or more by individuals, corporations, foundations, and other nonprofits since 2000 and will be updated periodically.

“The Million Dollar List is the most comprehensive resource on publicly reported gifts of this size,” says Patrick M. Rooney, the Center’s executive director. “One million dollars is a significant giving threshold for donors, so gaining a clear picture of where and how these gifts are made is an important step forward in the study of philanthropy.”

Previously, very little was known about these gifts, which have a unique ability to change lives and communities. Now, Rooney says, “donors and their advisors can see which organizations with causes matching their interests are receiving large gifts, where their peers are giving, and where there may be needs.”

Inform and Connect

The Million Dollar List can help foster collaboration around gifts and among donors, and helps donors and their advisors make informed and strategic decisions about giving.

Advisors can aid donors by searching for information on gifts by geography, dollar amount, type of charity, individual donor, organization name, or other customizable criteria.

Let’s say a couple in Colorado is concerned about the local environment, and they visit their financial advisor for advice. Using the Million Dollar List, the three of them could view million-dollar gifts to environmental causes in Colorado, which could give them a sense of whether the cause needs funding.
They could see the top recipient organizations, which might inspire the couple either to learn more about those organizations or to find other organizations to which they could make the first million-dollar gift.

They could also find out which other donors are working to improve the environment in Colorado, which could provide reassurance, raise a red flag, or prompt the discussion of pooling their gift with others for greater leverage.

Ellen Remmer, president of The Philanthropic Initiative (TPI), a leading nonprofit that advises donors on their giving, says, “The Million Dollar List lets donors scan the charitable landscape to see where there are gaps in funding by sector or location, to find philanthropic partners, and to discover where they can magnify their impact. It helps them develop their philanthropic style and strategy.”

The website, which is made possible by a grant from the Bill & Melinda Gates Foundation, also reveals trends and provides donors and advisors with context for these gifts.

For example, a higher percentage of individuals give “mega-gifts” of $50 million-plus than do corporations or foundations. However, about 70 percent of gifts from individuals were from people who made just one gift of $1 million or more, and nearly half of those made a single gift of less than $2 million.

The list also shows that million-dollar-plus gifts tend to be local: 63 percent of individuals’ gifts are given to organizations in the donor’s state of primary residence. And there’s a strong correlation between individuals’ million-dollar gifts and the stock market, with changes in the number of gifts and in the dollar amount of gifts closely following stock market trends.

A Catalyst for Transparency

“As donors get more engaged with their giving, they realize the power of being visible,” Remmer says. “They see themselves as leaders, as part of the solution they’re trying to accomplish with their giving—and with that they realize they have a role to play in influencing others. It’s important for them to stand up and be counted.”

The Million Dollar List offers a detailed look into an area of philanthropy that, until recently, was not well documented or understood. The more gifts that are included in the list, the more helpful it will become.

“Donors increasingly value transparency in philanthropy and are driving that trend,” says Una Osili, director of research at the Center on Philanthropy. “By providing information about their gifts to the Million Dollar List, they will encourage greater transparency among all those involved in charitable giving, increase opportunities to connect with other donors, and strengthen understanding of philanthropy.”

Contact Una Osili at uosili@iupui.edu and Ellen Remmer at ERemmer@tpi.org. Use the Million Dollar List.
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Revitalizing Your Development Program, 30 Steps in 30 Days
Linda Lysakowski, ACFRE

FEBRUARY 7, 2012, TUESDAY
Blue Ribbon Recipes for Capital and Endowment Fundraising Success
Penelope Cagney, MA, CFRE

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How to Create a Written Fundraising Plan in 6 Easy Steps
Sandy Rees, CFRE

MARCH 8, 2012, THURSDAY
Nonprofit Branding: Strategies to Stand Out and Win Donors
Jocelyne Daw

MARCH 20, 2012, TUESDAY
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Spinning Like a Top: 8 Secrets to Well-Oiled Fundraising Operations
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Fundraising from Canada
Mark Blumberg, B.A., LL.B, LLM, TEP

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Big Gifts for Small Shops
Alice Ferris, MBA, CFRE, ACFRE

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Valerie Lambert

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How to Turn Your Volunteers (Board and Non-Board Members) into Great Fundraisers
Amy Eisenstein, MPA, CFRE

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Greg Hammond, CFP, CPA

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The Ever Changing World of Small Non-Profit Boards
Sean Hammerle, CFRE

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Alphonse Brown, ACFRE

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